

## CLAIMS

What is claimed is:

### **METHOD OF MANAGING BUSINESS REFERRALS (SYSTEMS VIEW)**

1. A method in a computer system and network for managing business referrals, the method comprising:

establishing a referral list comprising data related to a plurality of entities that desire referrals to identify potentially desirable clients;

storing a general characterization of potentially desirable clients for a selected one of the plurality of entities,

sending to others of the pluralities of entities a request representing the general characterization; and

receiving a response to the request from at least one of the others of the plurality of entities, the response identifying a potentially desirable client to the selected entity.

#### **Contact information from referral list**

2. The method of claim 1 wherein contact information from the referral list is used to send the requests.

#### **Sending a message to the potential client**

3. The method of claim 1, further comprising sending a communication to the identified potentially desirable client to thereby refer the identified potentially desirable client to the selected entity.

#### **Automatically sending a message to the potential client**

4. The method of claim 3 wherein the sending of the communication is accomplished automatically without intervention by the selected entity or the at least one of the others of the plurality of entities.

**Automatically sending an e-mail message to the potential client**

5. The method of claim 4 wherein the communication that is sent is e-mail.

**The potential client answers the referral**

6. The method of claim 3, further comprising the identified potentially desirable client responding to the referral communication.

**The potential client accepts the referral**

7. The method of claim 6 wherein the response comprises an acceptance of the referral communication.

**The potential client declines the referral**

8. The method of claim 6 wherein the response declines the referral communication.

**The potential client is automatically reminded to answer the referral**

9. The method of claim 6, further comprising reminding the identified potentially desirable client to respond to the referral communication if the identified potentially desirable client has not responded to the referral within a predetermined time period.

**Adding to the entities**

10. The method of claim 1, further comprising adding an entity to the plurality of entities.

**Creating an ideal client profile for the added entity**

11. The method of claim 10, further comprising storing a general characterization of potentially desirable clients for the added entity.

### **Generating sales data from referrals**

12. The method of claim 1, further comprising storing, processing, and reporting data related to sales resulting from referrals of potentially desirable clients.

### **Generating sales data for each referral**

13. The method of claim 12 wherein the storing, processing, and reporting of sales data is performed for each of the referrals of potentially desirable clients.

### **Tracking referral**

14. The method of claim 1, further comprising storing, processing, and reporting the referrals of potentially desirable clients.

### **Tracking referrals given by each entity**

15. The method of claim 14 wherein the storing, processing, and reporting the referrals of potentially desirable clients is performed according to each of the plurality of entities.

### **Tracking referrals given by each entity for a predetermined time**

16. The method of claim 15 wherein the storing, processing, and reporting the referrals of potentially desirable clients is performed according to each of the plurality of entities for a predetermined period of time.

## **METHOD OF MANAGING BUSINESS REFERRALS (ENTITY VIEW)**

17. A method in a computer system and network for managing business referrals between business entities, the method comprising:

submitting a general description of potentially desirable clients to a referral list by a selected entity;

receiving a response from at least one of the other entities, the response identifying a potentially desirable client to the selected entity; and

receiving an inquiry from the identified potentially desirable client, wherein the identified potentially desirable client has been sent a communication indicating the referral.

**Entity receives information relating to the value of the referrals**

18. The method of claim 17, further comprising receiving data relating to the sales resulting from the referral received from at least one of the other entities.

**Entity selects a general description of potentially desirable clients**

19. The method of claim 17, wherein the selected entity submits a general description of potentially desirable clients by selecting from a menu offering types of clients.

**METHOD OF MANAGING BUSINESS REFERRALS (CLIENT/CONTACT VIEW)**

20. A method in a computer system and network for managing business referrals, the method comprising:

receiving a referral from a first entity that identifies a second entity as a possible entity with which to do business , wherein the second entity has submitted a general description of potentially desirable clients to a referral list;

responding to the referral by sending a communication to the first entity; and  
contacting the second entity identified by the referral.

**Notification of referral to a referral list manager**

21. The method of claim 20 further comprising sending a communication to a referral list manager.

**Communication generated in part by system**

22. The method of claim 20, wherein the communication responding to the referral is generated in part by activation of a link contained in the referral from a first entity.

## **METHOD OF MANAGING BUSINESS REFERRALS (REFERRING ENTITY VIEW)**

23. A method in a computer system and network for managing business referrals, the method comprising:

receiving a representation of a general description of potentially desirable clients described by a selected entity, wherein the selected entity has previously submitted the general description of potentially desirable clients;

sending a referral to identify a potentially desirable client to the selected entity;  
and

receiving a response to the referral from the selected entity, wherein the response indicates a status of the referral.

### **The potential client accepts the referral**

24. The method of claim 23 wherein the status is referral accepted.

### **The potential client declines the referral**

25. The method of claim 23 wherein the status is referral declined.

## **METHOD OF MANAGING BUSINESS REFERRALS (BEAUREGARD)**

26. A computer disk containing executable code for managing business referrals, the code comprising executable instructions for:

establishing a referral list comprising data related to entities that desire to identify potentially desirable clients;

storing a general description of potentially desirable clients for a selected entity,

sending to others of the entities a request representing the general description; and

receiving a response to the request from at least one of the other entities, the response identifying a potentially desirable client to the selected entity.

### **Contact information from referral list**

27. The method of claim 26 wherein contact information from the referral list is used to send the requests.

### **Sending a message to the potential client**

28. The method of claim 26, further comprising sending a communication to the identified potentially desirable client to thereby refer the identified potentially desirable client to the selected entity.

### **The potential client answers the referral**

29. The method of claim 28, further comprising the identified potentially desirable client responding to the referral communication.

### **DATA STRUCTURE CLAIM**

30. A data structure in a computer storage mechanism for managing business referrals, the structure comprising:

- a field for storing a requesting entity name;
- one or more fields for storing descriptions of potentially desirable clients for the requesting entity; and
- a field for storing a responding entity name.

### **SYSTEM FOR MANAGING BUSINESS REFERRALS (MEANS PLUS FUNCTION CLAIM)**

31. A computer system and network for managing business referrals, the system comprising:

- means for establishing a referral list comprising data related to entities that desire to identify potentially desirable clients;
- means for storing a general description of potentially desirable clients for a selected entity,

means for sending to others of the entities a request representing the general description; and

means for receiving a response to the request from at least one of the other entities, the response identifying a potentially desirable client to the selected entity.

#### **SYSTEM FOR MANAGING BUSINESS REFERRALS (APPARATUS CLAIM)**

32. A computer system and network for managing business referrals, the system comprising:

a referral list comprising data related to entities that desire to identify potentially desirable clients;

a referral partner database manager, wherein the referral partner database manager manages the referral list, receives communications from the entities and the identified potentially desirable clients, and sends communications to the entities and the identified potentially desirable clients; and

a communication medium that links the referral partner database manager to the entities and the identified potentially desirable clients.

33. A method of using referral surveys, comprising:

sending to a customer a referral query;

receiving from the customer a message in an electronic medium containing a referral;

extracting the referral from the message; and

sending the referral to a subscriber.

34. The method of 33, further comprising:

sending a referral survey to the customer whereby the sending to a customer a referral query is initiated in response to receiving a completed referral survey from the customer.

35. The method of 34, further comprising:  
sending to the customer an email containing a link to a referral survey.

36. The method of 35, further comprising:  
creating a referral survey in response to the customer activating the link.

37. The method of 33, further comprising:  
sending an introduction to an entity named by the referral.

38. The method of 37, further comprising:  
obtaining the subscribers permission to send an introduction to an entity named by  
the referral.